

WILLplus Terms of Engagement

Welcome to Perpetual Guardian's WILLplus service. These terms of service cover your use of the WILLplus service ("WILLplus Service") provided by Perpetual Guardian¹. By using WILLplus, you are agreeing to be bound by these Terms of Engagement, WILLplus Standard Terms and our [Privacy Policy](#).

Scope of Services

The WILLplus Service is comprised of:

1. **An annual update of your Will**, allowing you to ensure that it reflects your current circumstances. This service allows you to do any of the following:
 - Change your executor;
 - Change your guardian(s);
 - Add, remove gifts or change current gifts e.g. the amount gifted;
 - Add or remove beneficiaries.

We reserve the right to recommend an appointment with one of our advisers if the changes you wish to make require legal advice or are considered more than simple changes.

2. **Access to our MyDigitalVault** secure digital storage services ("Vault"), allowing you to electronically:
 - List;
 - Preview;
 - Upload;
 - Delete;
 - Share;
 - Store; and
 - Have online access to your Will and other important documents anytime, anywhere.

Important documents include but are not limited to your Wills, Enduring Powers of Attorney, Trust documentation, insurance policies, identity information and asset documentation.

3. **Secure physical storage** of your original Will.
4. Expert help for your loved ones following your death through our **Bereavement Help** service, either online or over the phone.

Fees and Payment

The WILLplus annual fee is \$34.95 (including GST) ("WILLplus fee"). Fees are paid in accordance with your direct debit (see below) or credit card payment. The WILLplus fee is subject to change in accordance with our WILLplus Standard Terms. We will inform you when your subscription is due for renewal including any change to the WILLplus fee.

Cancellation

Should you wish to cancel your subscription, you may do so by emailing us at myDigitalvault@pgtrust.co.nz. You may cancel your subscription at any time but will not be issued a refund for the remaining months of the annual subscription.

Your Vault account will remain in effect until it is cancelled under these Terms. You will receive a reminder email 30 days after payment was due. You will then be provided a further 30 day grace period to remove your content. If you do not pay on time, we reserve the right to suspend your use of the services at which point you will no longer have access to your Vault account.

Agreement

I agree to the WILLplus Terms of Engagement and WILLplus Standard Terms

Name	Date	Signature

Direct Debit Form

Name of account to be debited:		AUTHORITY TO ACCEPT DIRECT DEBITS (not to operate as an assignment or an agreement)							
Account details									
<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>		<input type="text"/> <input type="text"/> <input type="text"/>						
Bank	Branch number	Account Number	Suffix						
To the Manager: please print full postal address clearly		AUTHORISATION CODE <table border="1"> <tr> <td>0</td><td>2</td><td>2</td><td>8</td><td>6</td><td>3</td><td>3</td> </tr> </table> Date:	0	2	2	8	6	3	3
0	2		2	8	6	3	3		
Bank									
Branch									
Address									

I/We authorise you until further notice in writing to debit my/our account with you with all amounts which

The New Zealand Guardian Trust Company Limited
 (hereinafter referred to as the Initiator)

the registered initiator of the above Authorisation Code may initiate by Direct Debit.

I/We acknowledge and accept that the Bank accepts this authority only upon the conditions listed on this form.

Information to appear in my/our bank statement:

Payer particulars	Payer Code	Payer Reference
<input type="text"/>	<input type="text"/>	<input type="text"/>

Name of Account

Authorised Signature(s)

Approved _____ <table border="1"> <tr> <td align="center">02</td> <td align="center">2863</td> <td align="center">16</td> </tr> </table>	02	2863	16	For Bank Use Only <table border="1"> <tr> <td>Date Received:</td> <td>Recorded By:</td> <td>Checked By:</td> </tr> <tr> <td> </td> <td> </td> <td> </td> </tr> </table> Original – Retain at Branch Copy – Forward to Initiator if requested	Date Received:	Recorded By:	Checked By:				<table border="1"> <tr> <td align="center">BANK STAMP</td> </tr> </table>	BANK STAMP
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